

Immanuel Wallerstein's lasting impact on the field of world history

A historian's view

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The reconceptualization of time and space

Immanuel Wallerstein never engaged much with world or global history, certainly not with the field as it developed in the United States in the last few decades. Conversely world history did engage intensively with the legacy of Wallerstein's world-systems analysis, although only occasionally in an explicit way. My argument is that nowadays world and global history

would be in a different shape without Wallerstein's work. In historiography, "the global turn" has been primarily described as a redefinition of scales of time and space. World-systems analysis has taught us that global research needs to incorporate a multilayered systems-perspective that embeds comparisons and connections in an integrated and hierarchical frame.

Wallerstein's work has triggered a wide array of research, including different topics and questions, different research strategies, different scopes, scales and units of analysis. A central question remained whether these units—regions, states or the world-economy—permitted meaningful comparisons and to what extent the units of comparison were connected within broader webs or systems of interaction. Using multiple spatial frameworks has tended towards more narrative approaches and trans-regional comparisons. Moreover world-systems analysis has avoided the sharp categorical distinctions central to other approaches within modernization and globalization studies. It suggests the possibility of concurrent but divergent paths of development and stresses continuous rather than dichotomous processes. In short, world historians were forced to invent and reinvent geographical schemes, to question the limitations of regional frames and to debate how to connect and integrate the various spatial scales. That is why regions in a world-historical perspective are never a given. They are multidimensional and overlapping, from the capitalist world-system, the big Afro-Eurasian ecumene, maritime regions, border areas and rim zones, to small-scale social rural or urban systems. Within a given region, people share clusters of traits or connections that are different from those that they have with people beyond that region. Interacting regional histories make the world-economy; a developing world-economy also remakes regions. In addition, this reconceptualization of space urges historians to contextualize, rethink and sometimes reject concepts forged within Western social sciences. This is well illustrated by the unceasing debates about the nature of (capitalist) economy, states, formal and informal institutions, useful knowledge, property rights and so on.

A new level of ambition

Inspired by world-systems analysis, a global perspective needs to be highly ambitious. In its most basic form, it interrogates processes of "world-making," of social change in a broad time-space context. A world-systemic approach

compares, connects, incorporates, systemizes. World and global history deconstruct world-making processes and construct new world-making narratives. That is why the global perspective needs to be inclusive. It includes outer worlds and outer times in our world; it includes “us” in our narrative. It is aware that patterns observed in a global frame are often as much the outcome of geographical and historical contingencies as they are of historical necessity. World history does not reconstruct a singular march of humanity toward modernity; it portrays messy worlds and a multitude of historical experiences. It constructs visions of the past that are capable of accounting for both fragmentation and integration on multiple levels (local, regional, national, continental, and global). It builds frameworks that permit historians to move beyond the issues that have been dominating social sciences since the nineteenth century: cultural distinctions, exclusive identities, local knowledge, and the experiences of individual societies and states. It facilitates the study of large-scale, border-crossing comparisons, processes and systems. As argued, global comparisons do not erase regional frames, they reinvent them. We need more bottom-up, regionally-focused research, including all world-regions. This perspective also reevaluates Europe’s position in the world. Europe’s history is taking its own global turn, not by presenting a new singular encompassing story, or by stressing the uniqueness of Western civilization, but by creating regional stories in comparative, connected and systemic frames.

World-historical research does not use an exclusive macro-analytical perspective, based on pre-defined concepts and categories, nor does it support a hegemonic view on globalization as a fundamentally homogeneous process converging the world economy and world society. A regional, bottom-up perspective overcomes the global/local divide. Limiting comparisons to macro regions risks to downplay the importance of in-depth studies based on primary sources, to create or regenerate ethnocentric perspectives, and to obscure alternative or competing categories, concepts and connections. A world-historical view by definition questions temporal and spatial subdivisions and relations, not as hierarchical, but as contingent processes. We also can expect that this reorientation will change the practice of historical research over time: more collaborative, but also more decentralized research, outside the establish hierarchical structures of knowledge. This research will appeal to different academic

traditions, multiple languages, plural social groups. It will raise the need for awareness about the implication of historical research for each local community and the construction of its memory and self-representation, and ultimately the necessity of a strong cooperation with nonacademic institutions and groups.

Convergence and divergence in a global narrative

The tension between diverging scales of analysis prompted one of most fundamental debates within the field of world and global history, how to understand processes of regional convergence/integration versus divergence/hierarchy within an integrated world-systemic perspective? Or, how do we relate tensions of divergence within a context of increased connections? As Wallerstein has stressed countless times, this debate goes to the core of social sciences as we know it. Over the past two centuries, social sciences developed a dominant view that the modern world shows a pattern of more or less linear development in which all positive trends over time converge into a more homogenized world. By and large, left and right shared the same belief in the inevitability of progress and the linear upward pattern of social processes. This ideology of ultimate, positive convergence of all states and peoples reached an apotheosis in the three decades after the Second World War. At the same time, a number of analysts, including Immanuel Wallerstein, began to contest this linear model, arguing that the modern world was also one of heterogenization and polarization. When analyzing the social world, the linear versus polarizing models of historical development became a debate about whether the various regions or countries would converge to an approximately equal standard of economic, political and cultural structures. A world-systemic perspective shows that, despite the many ways in which there has been convergence, there has been simultaneous and strong polarization. Much of this can only be observed if different scales of analysis are interconnected, if regions are not analyzed as self-contained units, and if the global is not seen as an undifferentiated macroprocess.

The need for a new global and historical perspective instigated three interrelated research strategies facilitating multilayered and multifocal frames of analysis. The first compares individual cases in “a two way

mirror,” equating both sides of the comparison (reciprocal comparative analysis). The second strategy analyzes the interactions and interconnections between societies or systems, and how those patterns of contact shift (network analysis, translocal/transnational analysis). The third takes human systems in which various societies and their mutual contacts are given shape as the central unit of analysis. Examples include economic systems (the current world-system), migration systems, ecological systems (climate, disease), and cultural systems. Human societies are always linked together by several of these systems and act in reaction to these systems (systems analysis).

A wide range of recent world history studies has favored a network perspective. Moving away from classic comparative histories they brought up a new set of questions and subjects about connectedness, entanglement, reciprocity and circulation. Research topics include human and labor migration, chains and networks of commodities and long-distance trade, including methods of navigation, finance, tariffs and price movements. This angle explicitly questioned spatial frameworks, created more decentering narratives, and gave agency to the parties involved. It also risked to favor rather horizontal stories of entanglement, leveling out history. A systemic approach reminds us that connections of whatever kind are created and redefined in a world that is not flat. Stratification and inequality define the direction and the impact of networks. Societal relations configure the world on different levels or scales. In order to understand how they influence each other, a global framework has to integrate connections and networks within (overlapping) scales and (overarching) systems. As Wallerstein has argued, over time these societal systems have grown from small to large, from mini-systems such as chiefdoms, meso-systems such as civilizations, to the world-system of today. They have gotten larger, more complex, more hierarchical and more intertwined, reconfiguring connections and networks time and again.

Over the last two decades, cross-regional comparative and interconnective research has gained a wealth of new knowledge about the “birth of the modern world.” In order to understand why processes resembled or differed, why interactions went one way and not the other, one needs to understand the systemic logics that combine those patterns. A systems perspective does not narrow the lens to the macro-boundaries, it aims to

understand how the different scales or frames of time and space within the system tie together, forming a multitude of “worlds.” A “world” is not a constant; it is bound by nested human activity. It refers to social change that can only be understood in specific contexts of space and time. For that reason, no single delineation can be absolute. On the contrary, choosing a space and time perspective (where? when?) is linked to an intrinsic substantive choice (which social change?). Consequently, a global or world perspective cannot apply exclusive frameworks of space and time and cannot draw fixed boundaries. Neither do these worlds consist of fixed scales; they overlap from small to large. “Worlds” refer to these nested interaction networks, whether these are spatially small or large. Until recently, world-systems did not cover the entire surface of the planet. Only capitalism could transform itself from “being a world” to “the historical system of the world.”

The bulk of world-systems analysis has engaged with the so-called modern world-system or historical capitalism. Capitalism, as a social system, developed as a complex of stratified time, stratified space and stratified social power relations. There is a persistent perception, in both scholarly communities and popular opinion, that the recent economic and political developments are inverting an age-old trend of global divergence. This rhetoric of globalization and global convergence by and large obscures long-term global stratification, the reproduction of hierarchies in global power relations, together with the emergence of new inequalities. Processes associated with globalization tend to reproduce stratification and hierarchy in the capitalist system while at the same time globalization as a discourse mainly serves to legitimize neoliberal reforms. A global and historical systems-analysis reveals the insistent multidimensional and unequal nature of global capitalism.

In order to untie global processes of divergence and convergence, we need to map and understand the interaction between short-term fluctuations and long-term change in global capitalism. This was one of Wallerstein’s central arguments. A dominant focus on massive and large-scale change in the short-term has led to a large body of scholarly research that disregards long-term continuity and stratification in the capitalist world-system. Structural stratification remains one of the—if not the—most defining features of the global system of power relations today. The

work of Wallerstein's fellow-traveler Giovanni Arrighi is a challenging attempt to reconcile the political economy of capitalism with the call of global history to understand convergence and divergence, integration and hierarchy beyond established core-periphery relations. His work shows in a comparative, incorporated and historical way how modes of production, circulation, consumption, and distribution are organized, and how they created and transformed modes of reproduction.

The challenges and promises of world history

Research into the processes of integration and hierarchy in the capitalist world-economy needs to adopt a multilayered systems-perspective. Systems-analysis incorporates comparisons and connections in an integrated, hierarchical frame. I conclude with some epistemological reflections on applying a global and world-historical focus in social research. Over the years, world-systems analysis has significantly sharpened the discussions on the potentials and limits of a global or world-historical perspective. It has opened up fixed narratives that universalize particular and space-time bound experiences, without recreating new fixed master-narratives or essentialist regional/national stories. A systemic approach of world history has compelled us to rethink some fundamentals of historical research, and has taught us how a change of perspective can change the story we tell. During the last two decades, world history has made an impressive march through the institutions by creating associations, networks, journals, book series, periodic conferences, educational programs and professorships. This has generated ongoing debates about content, methodology, data and sources, scales and units of analysis. The legacy of Wallerstein's work has become clear in what I see as seven central ambitions in current world-historical research.

First, world historians must continuously rethink geographical and chronological schemes. They question the limitations of regional frames and debate how to connect and integrate the various spatial scales. They debate existing chronological frames, for example by tracing the roots of historical capitalism back to the 15th and 16th centuries and to the European and non-European countryside. This change in the time/space perspective modifies fundamentally the story of historical capitalism. It

differed greatly from the ideology of a free, Smithian market economy, and developed, using Fernand Braudel's phrase, as an anti-market where exceptional profits were reaped and monopolies were safeguarded. Capitalism expanded where new, transnational commercial-financial elites were able to ally themselves with assertive, mercantilist states. The commercial-agrarian empires in the eastern part of the Eurasian continent were not built on such alliances between capitalist and political elites.

Secondly, most scholars today probably agree that the roots of the capitalist world-system need to be explored in all their complexity, in order to cover the enormous range of transformations and innovations that arose with the emergence of modern economic growth. Despite the call for more holistic methods of analysis, interpretation schemes tend to remain monocausal, or at least Eurocentric. As we have argued, world-systemic approaches promote comparative research and redirect the long-standing convergence/divergence disputes in social sciences. They unlock new fields of research, introduce new approaches and create new data and knowledge. They have sharpened the discussion on the potentials and limits of a world perspective and urge historians to contextualize, rethink and sometimes reject concepts forged within Western social sciences.

Third, a world history perspective deconstructs both theories with universal aspirations derived from the historical experiences of the peoples of Northwestern Europe and North America, and the assumption of the state as a basic, self-enclosed and self-evident unit of analysis. A global approach calls for a more holistic systems perspective, aiming for new meta-narratives. Specialization is an inevitable part of the production of new knowledge, but since history emphasizes contextual understanding, new knowledge is of very limited significance without on-going attempts at integration and synthesis. Global thinking does not resurrect new dichotomies ("clash of civilizations"), it links and combines and it questions existing hierarchies (time, space, social) without flattening out history.

Fourth, a world history perspective questions self-evident causalities and stories of path-dependency. Patterns observed in a global frame are often as much the outcome of geographical and historical contingencies as they are of historical necessity. Much of our social theory is prone to teleology, seeking the roots of an inevitable present rather than exploring contingency of past experiences. World history does not reconstruct a

singular march of humanity toward modernity. It builds frameworks that permit historians to move beyond the issues that have been dominating social sciences since the nineteenth century.

Fifth, a world-historical perspective adopts multiple spatial scales. It does not erase regional frames, it reinvents them. As we argued, interacting regional histories make up the world economy and a developing world-economy remakes regions. We need more bottom-up, regionally-focused research, especially on today's Global South. This research must have global structures and dynamics as its objective. New approaches like reciprocal comparisons (regions as subunits), integrating comparisons (cycles as subunits) and frontiers (processes of integration/resistance) allow for a more bottom-up oriented focus within global research.

Sixth, a world-historical perspective encourages more interdisciplinary and transdisciplinary approaches and alternative academic models based on teamwork, networks, collaboration and joint projects across the globe. In order to move world history to a new stage, it is very important that we remove the mental and material barriers that prevent the development of this kind of integrated research programs.

Last but not least, a world-historical perspective pushes for more cosmopolitan thinking; it questions old and new processes of integration, differentiation, adaptation and resistance. It creates emancipating stories; stories that connect human actions within a broader human-made world. It allows peoples to re-imagine their future. This is not a plea for new legitimizing stories, but for a morally charged program. World history does not trade a national perspective for other exclusive frameworks, either global or subnational. It does not essentialize new concepts like the non-West, the Global South or the subaltern. It tells us about the complexity of both the past and present worlds. It makes moral claims about the way in which the world functions today and how it could function tomorrow. Since differences and diversity are basic components of the human story, the global perspective shows that understanding and handling differences is an important moral skill. Claims, interpretations and evaluations cannot be made solely within the framework of our own known world; they must reflect the complexity of human history. By unfolding a world-systemic approach, history strikes back. It integrates time and place and deals with interactions and the hierarchy of scales in the human world. This makes

it a barrier against the threat of new totalizing grand narratives or an undifferentiated multitude of new stories.

Immanuel Wallerstein titled his last commentary “This is the end; this is the beginning” (published on July 1st, 2019: <<https://iwallerstein.com>>). His massive work on world-systems analysis has come to an end. The debates on how his work has affected and will affect global approaches in human and social sciences have only begun.

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